

# STATE OF MONTANA

## JOB DESCRIPTION

*Montana state government is an equal opportunity employer. The State shall, upon request, provide reasonable accommodations to otherwise qualified individuals with disabilities.*

**Job Title:** Planning Technician

**Position Number:** 26057

**Location:** Helena, MT

**Department:** Transportation

**Division and Bureau:** Rail, Transit & Planning Division

**Section and Unit:** Administrative Section

**Job Overview:** This position serves as a planning technician within the Administrative Section and is responsible for state and federal law compliance through reporting, accounting and data management. This position participates in MDT's Planning Division federal reporting for funding streams and planning projects in coordination with Bureau Chiefs and program managers throughout the agency. This position also participates in the data management of the financial processes of the division. The incumbent must have an understanding of state and federal law accounting rules and regulations. The incumbent will also perform a variety of other duties that support work unit activities, which may include, but will not be limited to; bulk mailings, vehicle usage tracking, responding to external requests, assisting and supporting senior staff, records management and general office organization. The incumbent must possess extensive data entry, communication, attention to detail and organizational skills. The position reports to the Section Supervisor and does not directly supervise others.

### **Essential Functions (Major Duties or Responsibilities):**

#### **Planner I – Band 4**

##### **A. Program and Project Coordination**

**50%**

1. *Serves as the initial point of contact of the division. Communicating with people inside and outside the organization, representing the organization to customers, the public, government, and other sources. This information can be exchanged in person, in writing including development of routine letters, or by telephone or e-mail. Providing customer and personal services which includes*

*customer needs assessment, meeting quality standards for services, and evaluation of customer satisfaction.*

- 2. Participates in the development, design and creation of documents and reports based on MDT needs including program specific required state and federal documentation. With support from senior staff; creates specialized reports using MDT applications or software for use by Department personnel, other state and federal agencies, private consulting firms, and the public.*
- 3. Researches and examines federal regulations, policy guidance and circulars, restrictions, USCs, CFRs, state laws, spending authorities, and other written documents to review and disseminate transportation planning related data to the division. Prepares program information to keep the division apprised of changes in regulations or accepted practices and coordinate information necessary for state and federal administration.*
- 4. Researches Planning work programs for prior fiscal content and federal compliance to make recommendations to the supervisor, bureau chief and administrator.*
- 5. Participates in special projects as assigned. This involves researching, compiling, analyzing and organizing, coordinating, and development of routine reports for the director, administrator, governor or federal agencies.*
- 6. Assists in the planning and coordination of various meetings, conferences, and events to ensure effective information exchange among program constituents. Promotes attendance and participation by issuing notifications and invitations, speakers and participants. Monitors vendors to ensure the effective delivery of goods and services, reviews and approves claims and payments, and coordinates with vendors as necessary to resolve problems. Responds to inquiries regarding agendas, schedules, facilities and other details.*

**B. Data Management and Accounting**

**40%**

- 1. Entry and management of Planning Division financial information in databases or software programs by compiling data or documentation, verifying the accuracy of data, verifying the approval authority and checking data for recording errors. Coordinating with other planners to follow and refine operational procedures and using independent judgment regarding the most effective way to manage the required information.*
- 2. Establishes and maintains controls to ensure the timeliness, accuracy, and regulatory compliance of Planning Division financial activities by researching and analyzing problems and designing and/or identifying solutions. This involves identifying data and reporting needs; evaluating financial activities to identify accounting data that must be reported and extracted; examining state and federal sections of law requiring accounting and reporting procedures.*
- 3. Analyzes the impacts of changes in accounting procedures, policies and regulations and recommends courses of action or change and implementation strategies to management. This includes changes in transportation planning project development, monitoring, reporting and other issues.*

4. *Reviews accounting and other related systems to ensure that transactions are correct and accurate. Evaluates financial transactions to ensure financial activities are processed in an accurate and timely manner. This involves reviewing accounting transactions to ensure appropriate system functioning. The accuracy of accounting data, and compliance with MDT, state, and federal laws and regulations. Develops and recommends corrective actions to appropriate parties.*
5. *Analyzes the impacts of changes in accounting procedures, policies and regulations and recommends courses of action or change and implementation strategies to management. This includes changes in transportation planning project development, monitoring, reporting and other issues.*
6. *Assists in annual appropriations to properly establish project funding and properly reflect project funding according to state and federal requirements. This involves interpretation of state and federal sections of law requiring variable accounting and reporting procedures.*

**C. Other Duties**

**10%**

1. *Independently performs a variety of other complex duties as assigned by supervisors in support of the MDT mission and Division objectives. This includes coordinating special projects, attending ongoing education and training, and autonomously performs a variety of other duties.*

**Supervision**

*If this incumbent supervises others, please list each employee supervised and the position number:*

The number of employees supervised is: 0

The position number for each supervised employee is: N/A

**Physical and Environmental Demands:**

- Remaining seated for extended periods of time, with occasional walking, standing and bending.
- Operating a personal computer.
- Lifting (less than 30 lbs.)
- Operating a motor vehicle.
- Communicate in person, writing and over the phone
- Requires operating computers, mobile devices and office equipment; data collection and ensuring safety of co-workers and traveling public while working in the field.

**Knowledge, Skills and Abilities (Behaviors):**

- Requires work on multiple tasks simultaneously and effectively; remaining aware of workload and make appropriate adjustments to meet deadlines and complete tasks
- Demands for accuracy in all aspects of work performed.
- Compiling and analyzing data and information.
- Coordinating, negotiating, and instructing.
- Effectively communicate complex data relationships both verbally and in writing.

- Knowledge of adult education and training techniques.
- Customer Service: Discovers and meets internal and external customers' needs in a manner that provides satisfaction for the customer. Anticipates future needs of internal/external customers.
- Communication: Provides information to co-workers, customers, and the public through clear and concise verbal and written communication. Produces professional-quality reports. Demonstrates ability to develop rapport and maintain long-term associations with others both internal and external to the agency.
- Commitment and Loyalty: Ability and willingness to align behavior with the needs and goals of the organization and provide a visible role model for others. Reliable and dependable. Holds self-accountable for organizational activities, services, decisions, successes, and failures. Demonstrates an understanding of the link between job responsibilities and overall organizational goals and needs. Performs the job with broader goals in mind.
- Knowledge of the Job: Ability to carry out responsibilities effectively. Is aware of how own role/position fits in the organization mission. Understands the policies, procedures, rules, and laws that govern the work and exercise judgment in making necessary interpretations.
- Analytical/Interpretive Thinking: Accurately applies general standards and requirements to specific transportation planning issues.

### **Minimum Qualifications (Education and Experience):**

Combination of education and experience equivalent to a two-year college degree in business administration, computer technology or office technology. Alternative combinations of education and experience may be considered. Other combinations of directly related education/experience may be considered on a case-by-case basis.

**Training Assignment:** This agency may use a training assignment. Employees in training assignments may be paid below the base pay established by the agency pay rules. Conditions of the training assignment will be stated in writing at the time of hire.

### **Special Requirements:**

*List any other special required information for this position*

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|--|--|
| <input type="checkbox"/> Fingerprint check | <input checked="" type="checkbox"/> Valid driver's license |
| <input type="checkbox"/> Background check  | <input type="checkbox"/> Other; Describe                   |
| Union Code                                 | Safety Responsibilities                                    |

The specific statements shown in each section of this description are not intended to be all inclusive. They represent typical elements and criteria considered necessary to perform the job successfully.

**Signatures**

My signature below indicates the statements in the job description are accurate and complete.

Administrative Section Supervisor

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<b>Immediate Supervisor</b>	<b>Title</b>	<b>Date</b>
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<b>Administrative Review</b>	<b>Title</b>	<b>Date</b>
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My signature below indicates that I have read this job description.

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<b>Employee</b>	<b>Title</b>	<b>Date</b>
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**Human Resources Review**

<b>Job Code Title:</b>	<b>Job Code Number:</b>	<b>Pay Band:</b>
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My signature below indicates that Human Resources has reviewed this job description for completeness and has made the following determinations:

- |  |  |
|--|--|
| <input type="checkbox"/> FLSA Exempt             | <input type="checkbox"/> FLSA Non-Exempt               |
| <input type="checkbox"/> Telework Available      | <input type="checkbox"/> Telework Not Available        |
| <input type="checkbox"/> Classification Complete | <input type="checkbox"/> Organizational Chart attached |

**Human Resources:**

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<b>Signature</b>	<b>Title</b>	<b>Date</b>
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